Department of Defense

APPOINTMENT STANDARDIZATION PHASE III

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Presentation Outline

1. Appointment Standardization Review
2. APS III System Change Requests (7)
3. APS III System Incident Report (SIR)
4. Table Updates
5. Access to Care Summary Report Enhancement
6. Site Preparation and Training
7. Information Sources

Appointment Standardization Current Status

- Ten standard appointment types: ACUT, OPAC, ROUT, PCM, WELL, SPEC, PROC, GRP, EST, TCON. These are the only types allowed for medical appointing.
- Each appointment type is logically mapped to an Access to Care Category of 24 hours, 7 days, or 28 days. Mapping not enforced.
- MTF Book Only ($) version of each appointment type, e.g., ACUT$, ROUT$, PROC$, etc.
- 203 standard detail codes, with up to 3 detail code fields allowed on each appointment
- Define duration and workload type for each appointment slot in a schedule.
- MCP is the only booking option for Appointment Standardization

APPOINTMENT STANDARDIZATION

Appointment Standardization
Phase III

Objective: Include enhancements to make CHCS do more of the appointing work and to facilitate booking under Access to Care.

Phase III System Change Requests (SCR)

1. Display either only appointments that match the 4 Access to Care exact match criteria, or all appointments 28 days into the future.

2. Provide automatic CHCS reconfiguration of Open and Frozen appointments based on user criteria.

3. Track patient appointment requests that did not result in a booked appointment.

4. Provide a Unbooked Appointment Request Report that lists patients whose requests did not result in a booked appointment.

Phase III System Change Requests (SCR)

5. Provide an Appointment Change Tracking Report to show changes to appointment data from scheduled to the booked appointment.

6. Provide convenient access to the appointment Split and Join functionality when selecting appointments to book.

7. Provide an Enrolled Elsewhere Booking option to book appointments for non-enrolled active duty, for temporary duty beneficiaries, and for patients enrolled to facilities not on the CHCS host.

Phase III System Incident Requests (SIR)

1. CHCS does not warn the user that they are booking an appointment outside the access standard and will receive a ‘Not Met’ status under the following circumstances: there are no available appointments within the access standard and a user selects an appointment between the access expiration date/time and the end of that same day (the grey zone).

2. CHCS does not offer the user an appointment refusal as follows: the search is by appointment type, appointments are available within the access standard, and an appointment is selected in the gray zone. These are set to ‘Not Met’ in error.

1. Display Appointments out 28 Days

- **Requirement:** When booking an appointment, display either
  - All appointments that match the user search criteria, the access standard, and 2 other Access to Care (ATC) criteria, or
  - All available appointments 28 days into the future regardless of the ATC Category

- **Benefit**: CHCS will do the work of matching the patient to the correct appointment. The user should be able to book faster, more easily, more accurately, and with less training. Access to Care data should be accurate and consistent.

1. Display Appointments out 28 Days

After entering the search criteria, the user has the option to select either of the following to view available appointments:

- *Exact Match Option*: Displays only appointments that match the ATC Standard, the user search criteria, and 2 other Access to Care (ATC) criteria, . This is the default option.

- *All Appointments Option*: Displays all available appointments 28 calendar days into the future (matching and non-matching) **for all ATC Categories**

1. Display Appointments out 28 Days

- Both new options apply to ALL MCP booking functions including Consult/Referral Booking.
- Both options replace current ATC search methods. Current methods show only appointments available within the access standard.
- Core PCM Booking processing will not change, (i.e., searching from PCM to PCM Alternate Places of Care to PCM Group members at their Places of Care within the enrolling MTF).
- Consult/Referral Booking uses the two options but will require some special processing.

1. Display Appointments out 28 Days

- A 4th detail code has been added.
- For appointments that are not related to consults or referrals, the appointment type must be corrected to match the ATC Category in order to book the appointment.
- For all booking options, detail codes must be corrected to match the patient's demographics in order to book the appointment.
- Exact searches find appointments based on minutes, not days, e.g. the standard time to book a Routine appointment is 7 days X 24 hours X 60 minutes = 10080 minutes from the time the call is received.

1. Display Appointments out 28 Days

In all MCP booking functions other than Consult/Referral booking, select the following appointment types (including $ extenders) for the corresponding Access to Care (ATC) Category. Otherwise user must correct the appointment type to an allowable type.

ATC Category	Allowable Appt Type	Standard
ACUTE	ACUT/$	24 hours
ACUTE	OPAC/$	24 hours
ROUTINE	ROUT/$	7 calendar days
WELLNESS	PCM /$	28 calendar days
WELLNESS	WELL/$	28 calendar days
SPECIALTY	SPEC/$	28 calendar days
SPECIALTY	PROC/$	28 days/pvdr designated
FUTURE	EST/$	provider designated
FUTURE	GRP/$	provider designated

1. Display Appointments out 28 Days

Exact Match Option

1. Display Appointments out 28 Days

- Exact Match Criteria (all four must be true):
  - appointment matches the user entered standard search criteria, e.g., clinic specialty, provider, location, place of care, duration, date range, etc.
  - appointment is within the ATC time period, e.g., is within 7 days **to the minute** for a Routine ATC
  - for other than consult or referral appointments, the appointment type matches the ATC category, e.g., a ROUTINE ATC category must have a ROUT appointment type
  - appointment has one of the following:
    - ✓ detail codes that match the patient's demographics (i.e., for age, gender, and patient access type) or
    - ✓ has no detail codes or
    - ✓ has only a WEA detail code

1. Display Appointments out 28 Days

- ***Exact Match Option***
  - Only displays appointments that meet the four criteria.
  - If Exact Match appointments are available, the user will be placed directly in the Exact Match screen to select an appointment to book.
  - Any user can book these appointments.
  - User may elect to skip the exact match appointments and proceed to list All Appointments.

1. Display Appointments out 28 Days

All Appointments Option

1. Display Appointments out 28 Days

- ***Accessing the All Appointments Option***

  - Once the appointment search is initiated, if Exact Match appointments are not available, the system will display a screen that informs the user there are no exact matches. The user may then press return once and enter the All Appointments screen to view 28 days of appointments.

  - Or the user may press return twice to bypass the Exact Match screen and select the All Appointments option directly.

1. Display Appointments out 28 Days

- ***All Appointments Option Features***
  - Always displays all available appointments (matching and non-matching) for 28 calendar days into the future for any ATC Category.
  - Exception: When performing a search for a follow-up appointment for a consult/referral, CHCS displays all appointments up to 180 calendar days into the future.
  - Page down to view continuation pages of appointments out 28 or 180 days, or select date range.

1. Display Appointments out 28 Days

- ***The All Appointments Option displays:***
  - **High-light appointments**: Available appointments that meet the 4 Exact Match criteria discussed on slide 16. Any user can book these appointments.
  - Low-light appointments: Available appointments that meet only the user standard search criteria. Users may require security keys to book some low light appointments.

1. Display Appointments out 28 Days

- ***All Appointments Option, low-light appointments:***
  - If not preceded by a hyphen, the user is permitted to book the appointment.
  - If preceded by a hyphen, the user may only view the appointment and is not permitted to book the appointment.
    - Appointment is displayed for information only.
    - In order to book the appointment, it must be referred to someone who has the appropriate security keys.

1. Display Appointments out 28 Days

- ***All Appointments Option, low-light appointments not preceded by a hyphen, Scenario I*:**
  - The appointment meets the Exact Match criteria but is outside the access standard.
  - Booking will be straightforward.
  - User will be warned that the appointment is outside the access standard.
  - If appointments are available within access standards, the user will be requested to enter a refusal reason if booking outside the access standard.

1. Display Appointments out 28 Days

- ***All Appointments Option, low-light appointments not preceded by a hyphen, Scenario II*:**
  - The appointment does not meet the Exact Match criteria. May or may not be outside the access standard.
  - Users are required to correct incorrect appointment data so that the appointment meets the following exact match criteria, e.g., the appointment type, the gender, the age, and patient access type detail codes.
  - The user has the required security keys to correct the data in order to book the appointment.

1. Display Appointments out 28 Days

- ***All Appointments Option, low-light appointments not preceded by a hyphen, Scenario II (continued)*:**
  - User must enter all the applicable detail codes in order to correct one detail code when booking an appointment.
  - User will be warned if the appointment is outside the access standard.
  - If a single provider is preferred and has no appointments within the access standard, but other providers at the selected location have available appointments, CHCS will notify the user of the other appointments.

1. Display Appointments out 28 Days

- ***Consult/Referral Booking Processing***
  - For an ‘initial’ appointment, the ATC category is derived from the Referral Priority entered by the provider. **Note**: If the first appointment was canceled, it is no longer the initial appointment.
  - For an ‘initial’ appointment, CHCS will display appointments that match the referral criteria and will highlight appointments that match the *derived* ATC Category per the table on the following slide.
  - For a 2nd, 3rd, etc. appointment, the user may select the ATC Category for the appointment. CHCS will high-light appointments that match the *selected* ATC Category per the table on the following slide.

1. Display Appointments out 28 Days

In Referral/Consult booking, the ATC Category on the initial appointment is derived from the Referral Priority entered by the Provider. For 2nd, 3rd appointments, the user may select the ATC Category. The clinic will be responsible for selecting the correct appointment type. CHCS will not require correction of the appointment type.

Priority	ATC Category	Allowable Appt Types	Standard
STAT, ASAP TODAY, 24 HR	ACUTE	All types	24 hours
48 HRS	ROUTINE	All types	7 calendar days
72 HRS	ROUTINE	All types	7 calendar days
ROUTINE	SPECIALTY	All types	28 calendar days
PREOP	SPECIALTY	All types	28 calendar days
2nd, 3rd appt - user selects ATC	FUTURE	All types	provider designated

1. Display Appointments out 28 Days

Sample Screens

1. Display Appointments out 28 Days

Managed Care Program Menu → HMCP Health Care Finder Menu → BHCF Health Care Finder Booking → (E)nrolled Elsewhere Booking

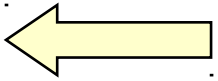
ENROLLED ELSEWHERE BOOKING SEARCH CRITERIA

Patient: SIMMONS,JEFF J FMP/SSN: 20/555-12-3456

Place of Care: PLOC Phone:
Detail Codes: ATC Category:
Provider: Appt Type:
Location: Spec Type:
Clinic Spec: Provider Spec:
Date Range: Days of Week:
Time Range: Duration:

****

* **Access to Care Category**
Location
Specialty
* **Place of Care**
* **Provider**
Appointment Type
Duration
\+ **Detail Codes**



1. Display Appointments out 28 Days

ENROLLED ELSEWHERE BOOKING SEARCH CRITERIA

Patient: SIMMONS,JEFF J — FMP/SSN: 20/555-12-3456
Place of Care: FAMILY PRACTICE — PLOC Phone:
Detail Codes: — ATC Category: ROUTINE
Provider: CAMPBELL,ANN — Appt Type:
Location: — Spec Type:
Clinic Spec: — Provider Spec:
Date Range: 16 Jun 2003 to 22 Jun 2003 — Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400 — Duration:

~TUE 1000 17Jun03 ROUT 1/0 30 MA 30-60 BPAD
~TUE 1030 17Jun03 ROUT 1/0 30 MA 30-60 BPAD
TUE 1100 17Jun03 ROUT 1/0 30 MA 30-60 BPAD
TUE 1130 17Jun03 ROUT 1/0 15 MA 30-60 BPAD

Matching Appts

Use SELECT key to select appointment to be booked
Or Select one slot to split, multiple consecutive slots to join
Press F9 to view additional appointment data

New join & split

Select (A)ll Appts or (Q)uit: A//

***** Page down for next page of available appointments up to 28 days out.**

1. Display Appointments out 28 Days

ENROLLED ELSEWHERE BOOKING SEARCH CRITERIA

Patient: SIMMONS,JEFF J — FMP/SSN: 20/555-12-3456

Place of Care: FAMILY PRACTICE — ATC Category: ROUTINE

Provider: CAMPBELL,ANN — Appt Type:

Location: — Spec Type:

Clinic Spec: — Provider Spec:

Date Range: 16 Jun 2003 to 22 Jun 2003 — Days of Week: M TU W TH F SA SU

Time Range: 0001 to 2400 — Duration:

****

TUE 1000 17Jun03 ROUT 1/0 30 MA 30-60 BPAD WEA

~ TUE 1030 17Jun03 ROUT 1/0 30 MA 30-60 BPAD

- TUE 1400 17Jun03 ACUT$ 1/0 30 FE 45-60 BPNAD PAP

\- TUE 1430 17Jun03 EST 1/0 30 FE 30-60 BPNAD PAP

- WED 0830 25Jun03 ACUT$ 1/0 30 FE 30-60 BPAD PAP

\+ WED 0900 25Jun03 ROUT 1/0 30 MA 30-60 BPAD

****

4th Detail Code

High-light Matching appts

Low-light appts

Use SELECT key to select appointment to be booked

Or Select one slot to split, multiple consecutive slots to join

'-' indicates security key(s) are required to select these slots

Press F9 to view additional appointment data

New join & split

*** Note: User does not have the required security keys.

***** Page down for next page of available appointments up to 28 days out.**

1. Display Appointments out 28 Days

ENROLLED ELSEWHERE BOOKING SEARCH CRITERIA

Patient: SIMMONS,JEFF J — FMP/SSN: 20/555-12-3456

Place of Care: FAMILY PRACTICE — ATC Category: ROUTINE

Provider: CAMPBELL,ANN — Appt Type:

Location: — Spec Type:

Clinic Spec: — Provider Spec:

Date Range: 16 Jun 2003 to 22 Jun 2003 — Days of Week: M TU W TH F SA SU

Time Range: 0001 to 2400 — Duration:

****

TUE 1000 17Jun03 ROUT 1/0 30 MA 30-60 BPAD WEA

~ TUE 1030 17Jun03 ROUT 1/0 30 MA 30-60 BPAD

TUE 1400 17Jun03 ACUT$ 1/0 30 FE 45-60 BPNAD PAP

* TUE 1430 17Jun03 EST 1/0 30 FE 30-60 BPNAD PAP

WED 0830 25Jun03 ACUT$ 1/0 30 FE 30-60 BPAD PAP

\+ WED 0900 25Jun03 ROUT 1/0 30 MA 30-60 BPAD

****

4th Detail Code

High-light Matching appts

Low-light appts

Use SELECT key to select appointment to be booked

Or Select one slot to split, multiple consecutive slots to join

'-' indicates security key(s) are required to select these slots

Press F9 to view additional appointment data

New join & split

*** Note: User has the required security keys.

***** Page down for next page of available appointments up to 28 days out.**

1. Display Appointments out 28 Days

FILE APPOINTMENT

Patient: SIMMONS,JEFF J FMP/SSN: 20/555-12-3456
Place of Care: FAMILY PRACTICE PLOC Phone: 234-0932
Detail Codes: ATC Category: ROUTINE
Provider: CAMPBELL,ANN Appt Type:
Location: Spec Type:
Clinic Spec: Provider Spec:
Date Range: 16 Jun 2003 to 22 Jun 2003 Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400 Duration:

TUE 1430 17Jun03 EST 1/0 30 FE 30-60 BPNAD PAP CAMPBELL,ANN

---------- Select Slot #1 of 1 ----------

The appointment type does not match the ATC Category. Do you wish to correct?// Yes

The patient gender or age detail code does not match patient demographics. Do you wish to correct?// Yes

The patient access type detail code does not match the patient demographics. Do you wish to correct?// Yes

Select APPOINTMENT TYPE: ROUT$ ROUTINE APPT ACTIVE 30
Select DETAIL CODE: 30-60 30 YEARS TO 60 YEARS OLD
Select ANOTHER DETAIL CODE: **MA** MALE
Select ANOTHER DETAIL CODE: **BPAD** Active Duty Only
Select ANOTHER DETAIL CODE: CHOL CHOLESTROL
Appointment CHANGE REASON: **MATCH PATIENT'S DEMO DATA** (*Note: field is mandatory*)

1. Display Appointments out 28 Days

Security Keys

1. Display Appointments out 28 Days

Security Keys

- If a user selects an appointment with an incorrect appointment type and/or detail code (i.e., age, gender, or patient access type), CHCS will require the user to correct the appointment type and/or detail codes in order to book the appointment.
- The user must have the appropriate security keys to correct appointment types and detail codes.
- There are two new security keys: APPT CHANGE AUTHORITY and SD CHG AGE GNDR.

1. Display Appointments out 28 Days

Security Keys (continued)

APPT CHANGE AUTHORITY

- A provider may control who can change specific appointment types by implementing an optional new security key, APPT CHANGE AUTHORITY. This security key will be available for each appointment type in a Provider's Profile, esp., for the PROC appointment type.
- Six enterprise-wide security keys are available to use for the APPT CHANGE AUTHORITY: SDCL1, SDCL2, SDCL3, SDHCP1, SDHCP2, SDHCP3.
- Providers have the option to name their own security keys as shown on the following slide. New security keys must be predefined by the CHCS system administrator.

1. Display Appointments out 28 Days

Security Keys (continued)

SD CHG AGE GNDR

- CHCS shall limit the ability to change age and gender detail codes through a new security key, SD CHG AGE GNDR.
- If the user has this key, the user will be permitted to book an appointment with an incorrect gender or age code.
- The user must correct the incorrect code in order to book the appointment.
- The user may optionally enter an override reason for this change.

1. Display Appointments out 28 Days

Security Keys (continued)

EXISTING SECURITY KEYS

- The SD MOD APPT security key will be obsolete and can be removed from the profiles.
- A CHCS user will still be required to have the SD APPT STAND security key (from APS II) to modify appointment types and detail codes on an appointment.
- Copying Clinic Profile appointment type data to pre-existing Provider Profiles will overlay appointment type data in the Provider Profile but not overlay the appointment slot data.

1. Display Appointments out 28 Days

APPOINTMENT TYPE: ACUT$ SD HCP PROFILE – CONTINUATION

- DURATION: **30** STATUS: **ACTIVE**
- WORKLOAD TYPE: **COUNT** REFERRAL REQUIRED: **NO**
- PULL PATIENT RECORD: **NO** PULL RADIOLOGY RECORD: **NO**
- PRODUCE ENCOUNTER FORMS: **NO** SEND REMINDER NOTICE: **NO**
- TOTAL # OF OVERBOOKS: MAX # OF OVERBOOKS PER SLOT:
- INSTRUCTIONS:
- Select BOOKING AUTHORITY:
- **SD ACUT$ APPT BOOK (example only, multiple keys allowed)**

- Select APPT CHANGE AUTHORITY:
- **SD ACUT$ APPT CHANGE (example only, multiple keys allowed)**
-

- Select OVERBOOK AUTHORITY:

2. Automatic Reconfiguration of Open and Frozen Appointments

- **Requirement**: CHCS will automatically reconfigure any appointment that has not been booked (i.e., is open or frozen). Reconfiguration requires the entry of optional change criteria for the individual appointment. Change criteria may be defined at the clinic, provider, and/or appointment level.

- **Benefit**: Sites may use this capability to change unbooked appointments into appointments that are more likely to be booked, e.g., a WELL appointment to a ROUT appointment, a 60 minute appointment to a 30 minute appointment, etc. Capability designed to save time with schedule management.

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Features

- During Template and Schedule creation, a user has the option to define criteria to instruct CHCS to automatically change any appointment to a new configuration at a user defined number of days before the appointment.
- The user may define up to 3 sets of reconfiguration criteria for each appointment type in each Clinic or Provider Profile. These may be used as defaults when building templates and schedules.
- The user may define up to 3 sets of reconfiguration criteria for each appointment slot in a Provider's template and schedule.

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Criteria

- Data that can be reconfigured (changed) include:
  - # days before the appointment to perform the reconfiguration (0 – 99)
  - appointment type
  - **4 detail codes**
  - duration
  - workload type
  - # patients per slot
  - appointment unfreeze flag

2. Automatic Reconfiguration of Open and Frozen Appointments

Defining Reconfiguration for a Clinic Profile

- Reconfiguration Criteria is defined for selected or for all appointment types in the Clinic Profile.
- Clinic Reconfiguration Criteria will be a default for the Provider Profile reconfiguration criteria.
- Clinic Reconfiguration Criteria will not default directly to the appointment slot.

2. Automatic Reconfiguration of Open and Frozen Appointments

Defaulting Reconfiguration to a Provider Profile from a Clinic Profile

- The user will be asked, “Transfer newly entered/edited reconfigured appointment type(s) to Provider Profile(s)? No//
- The user may select both the Providers and the Providers’ appointment types to receive the reconfiguration data.
- Copying Reconfiguration Criteria will overwrite criteria in existing Provider Profiles for the appointment type.
- Reconfiguration sets must be copied to a Provider’s Profile if they are to be used for appointments in the Provider’s template and schedule.

2. Automatic Reconfiguration of Open and Frozen Appointments

Defining Reconfiguration for a Provider Profile

- Reconfiguration sets are optional and may be defined:
  - only in the Provider Profile by appointment type
  - or may be copied from the Clinic Profile to new or existing Provider Member Profiles by appointment type.

- A user may overwrite/update reconfiguration data in the Provider Profile at any time. Changes will take effect immediately for new schedules but will not change existing schedules unless edited on the appointment itself.

2. Automatic Reconfiguration of Open and Frozen Appointments

Defining Reconfiguration for an Appointment Slot

- Question 1: When starting to build/edit a Provider schedule, the user will initially be asked, “Do you want to add/edit reconfiguration data ? N// “ This refers to the entire schedule.

- Question 2: If the answer is Yes, then, if reconfiguration data is defined for the Provider, the user is asked, “Do you want to copy the Reconfiguration Appointment types from the Provider/Appointment Type Profile?”.

- The following table describes this process to build reconfiguration data in the Provider’s template/schedule.

2. Automatic Reconfiguration of Open and Frozen Appointments

Defining Reconfiguration for an

1. Do you want to reconfigure slots?	Provider Profile has defined reconfigure data for appt type	2. Copy reconfigure data from the Provider Profile?	What happens?
No (default)	N/A	N/A	Reconfigure data may not be entered for the entire schedule. Normal schedule build.
Yes	No	N/A	Blank Reconfigure Screen displays. User may define own reconfigure data for slots.
Yes	Yes	No	Blank Reconfigure Screen displays. User may define own reconfigure data for slots.
Yes	Yes	Yes	Copies and displays the

2. Automatic Reconfiguration of Open and Frozen Appointments

Defaulting Reconfiguration to an Appointment Slot from the Provider Profile

- Reconfiguration sets will be copied from the Provider Profile into the provider's appointment schedule slots as they are created.
- Reconfiguration criteria is always copied from the corresponding appointment type in the Provider Profile.
- A user may accept the default reconfiguration criteria from the Provider Profile then correct the data as needed.

2. Automatic Reconfiguration of Open and Frozen Appointments

General Reconfiguration Features That Apply to all Levels

- Appointment types may only be changed to appointment types defined in the Clinic Profile.
- The following appointment types may not be reconfigured: APV, EROOM, N-MTF, T-CON*, and RNDS.
- Blank fields in Reconfiguration Criteria indicate that the data retains its current value.
- Schedule slots may be batch created.

2. Automatic Reconfiguration of Open and Frozen Appointments

General Reconfiguration Features That Apply to all Levels (continued)

- If the Change Detail Code value is No, then no changes will be made to the current detail codes on the appointment.
- If the Change Detail Code value is Yes and the reconfiguration detail codes are all blank, then all detail codes will be removed from the appointment.
- In order to change one detail code, all detail codes must be entered.

2. Automatic Reconfiguration of Open and Frozen Appointments

General Reconfiguration Features That Apply to all Levels (continued)

- The new duration in any reconfiguration occurrence may be ANY duration that is equal to or less than the **original** slot duration. The new duration replaces the original duration in the provider schedule.
- If the duration of the **original** appointment is shortened, the scheduling clerk is responsible for creating a new appointment for the resulting time gap in the schedule. CHCS will not perform that function.
- As a workaround, the user may assign more than one patient to the shortened appointment.

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Execution

- An appointment will be reconfigured if the appointment status is open or frozen at the time the reconfiguration task is run, i.e., booked appointments will not be reconfigured.
- The new appointment configuration will take effect after midnight on the user defined number of days before the appointment.
- The date appointments will be reconfigured is computed as: the appointment date minus the number of days before the appointment , e.g. if the number of days is 7, an 8 August appointment will be reconfigured on 1 August between 0000 and 0600.

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Execution (continued)

- The reconfiguration task only executes the reconfiguration criteria recorded on the appointment.
- **Summary**: Reconfiguration criteria may be copied from the Clinic Profile to the Provider Profile and from the Provider Profile to the appointment. It must be stored on the appointment to be executable. Once created, to change the reconfiguration data, it must be corrected on the appointment slot or batch of slots with the same appointment type.

2. Automatic Reconfiguration of Open and Frozen Appointments

Sample Screens
Clinic Profile

2. Automatic Reconfiguration of Open and Frozen Appointments

PAS→Scheduling Supervisor Menu→PROF Profiles Menu →CPRO Clinic Profile Edit

Edit Clinic Profile

Select CLINIC: FAM

1 FAMILY PRACTICE A CLINIC DIVISION A BGAA

2 **FAMILY PRACTICE CLINIC DIVISION A BGAB**

Choose 1-2: **2 FAMILY PRACTICE**

Select (C)linic, (D)iagnosis/Procedure Coding, or (Q)uit: **C// <CR>**

Select (A)ctive, (I)nactive, **(R)econfigure**, or (Q)uit: A// **R**

2. Automatic Reconfiguration of Open and Frozen Appointments

APPOINTMENT TYPE RECONFIGURATION – CLINIC

Clinic: **FAMILY PRACTICE**

Appointment Type:	Reconfigure
OPAC	
PCM$	**Yes**
ACUT	
ROUT	
ROUT$	
EST	
* **EST$**	**Yes**
WELL	**Yes**

2. Automatic Reconfiguration of Open and Frozen Appointments

APPOINTMENT TYPE RECONFIGURATION – CLINIC

Clinic: **FAMILY PRACTICE**
Original Appt Type: **EST$**

1st reconfiguration

Reconfigured Appointment Type: **EST**

New appt type

Number of Days before the Appt: **14**
Workload Type:
Slot Duration: **30**
Max # of Patients per Slot: **2**
Unfreeze: **NO**
Change Detail Codes: **NO**
Detail Codes: *(up to 4)*

2. Automatic Reconfiguration of Open and Frozen Appointments

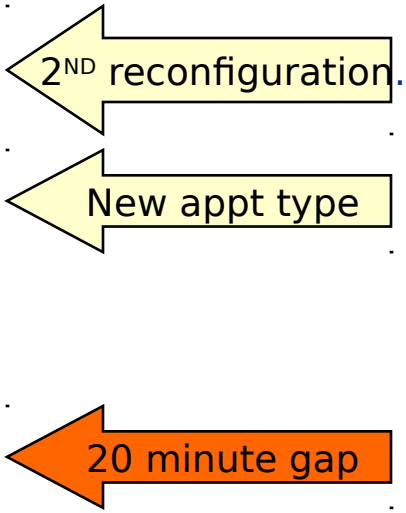
APPOINTMENT TYPE RECONFIGURATION - CLINIC

Clinic: **FAMILY PRACTICE**
Original Appt Type: **EST$**

Reconfigured Appointment Type: **ROUT**

Number of Days before the Appt: **7**
Workload Type: **COUNT**
Slot Duration: **40**
Max # of Patients per Slot: **1**
Unfreeze: **YES**
Change Detail Codes: **YES**
Detail Codes:

BPAD
17-65



2. Automatic Reconfiguration of Open and Frozen Appointments

Sample Screens
Provider Profile

2. Automatic Reconfiguration of Open and Frozen Appointments

Menu Path: PAS→Scheduling Supervisor Menu→PROF Profiles Menu →PPRO Provider Profile Edit

APPOINTMENT TYPE RECONFIGURATION - PROVIDER

Clinic: **FAMILY PRACTICE**
Provider: **CAMPBELL, ANN**
Original Appointment Type: **EST$**

---Rec
onfigured Appointment Type # days to reconfigure

*	**EST**	**14**
	ROUT	**7**
	ACUT	**0**

2. Automatic Reconfiguration of Open and Frozen Appointments

Menu Path: PAS→Scheduling Supervisor Menu→PROF Profiles Menu →PPRO Provider Profile Edit

APPOINTMENT TYPE RECONFIGURATION – PROVIDER

Clinic: **FAMILY PRACTICE**
Provider: **CAMPBELL, ANN**
Original Appointment Type: **EST$**

Reconfigured Appointment Type: **EST**

Number of Days before the Appt: **14**
Workload Type:
Slot Duration: **30**
Max # of Patients per Slot: **1**
Unfreeze: **YES**
Change Detail Codes: **YES**
Detail Codes:
WEA

Reconfigure AND Unfreeze a frozen appointment.

2. Automatic Reconfiguration of Open and Frozen Appointments

Sample Screens
Building Templates or Schedules

2. Automatic Reconfiguration of Open and Frozen Appointments

PAS→Scheduling→ SCHE Schedules Menu→ CSCH Create Schedules

or CTEM Create/Edit Daily Template

- User selects the clinic and provider for the template or schedule.
- User is asked, “Do you want to add/edit reconfiguration data ? N// “

2. Automatic Reconfiguration of Open and Frozen Appointments

PAS→Scheduling→ SCHE Schedules Menu→CSCH Create Schedules
or CTEM Create/Edit Daily Template

Create Schedules for Monday

Clinic: **FAMILY PRACTICE**
Provider: **CAMPBELL, ANN**

Start Time: **0800**
Stop Time: **0930**
Number of Slots:
Appointment Type: **EST$**
Workload Type: **COUNT**
Slot Duration: **30**
Max # of Patients per Slot: **1**
Detail Codes:

Slot Comment:

** Do you want to copy the Reconfiguration Appointment types from Provider/Appointment type Profile? **YES**

2. Automatic Reconfiguration of Open and Frozen Appointments

Create Schedules for Monday

Clinic: **FAMILY PRACTICE**
Provider: **CAMPBELL, ANN**

Reconfigured Appointment Type	# days to reconfigure
* **EST**	**14**
ROUT	**7**
ACUT	**0**

These were transferred from the provider profile.

2. Automatic Reconfiguration of Open and Frozen Appointments

Create Schedules for Monday

Clinic: **FAMILY PRACTICE**
Provider: **CAMPBELL, ANN**
Original Appt Type: **EST$**
Start/Stop Slot Time: 0800 - 0930

Batch apply reconfiguration.

Reconfigured Appointment Type: **EST**

Number of Days before the Appt: **14**
Workload Type: **NON-COUNT**
Slot Duration: **30**
Max # of Patients per Slot: **1**
Unfreeze: **YES**
Change Detail Codes: **YES**
Detail Codes:

Change # patients per slot.

Reconfigure AND Unfreeze appt

2. Automatic Reconfiguration of Open and Frozen Appointments

NAVMEDCEN PORTSMOUTH VA 22 Sep 2003@1405 Page 1

PROVIDER SCHEDULE

WEDNESDAY 01 Oct 2003

Division: NH PORTSMOUTH,VA
Clinic: FAMILY PRACTICE
Provider: CAMPBELL,ANN

Start Time	Appt Type	Wkl Typ	Open/ Book	Dur	Detail Codes	Slot Comment	Slot Stat	Detail Chg	Unfrz
	< Reconfiguration Appointment Type >					Reconf Date			
0800	EST	N	1/0	30			OPEN		
	ROUT	C	1/0	40	BPAD 17-65	23 Sep 2003	YES	NO	
	ACUT	C	1/0	20		30 Sep 2003	YES	NO	
0830	EST	N	1/0	30			OPEN		
	ROUT	C	1/0	40	BPAD 17-65	23 Sep 2003	YES	NO	
	ACUT	C	1/0	20		30 Sep 2003	YES	NO	
0930	EST$	C	1/0	30			OPEN		

2. Automatic Reconfiguration of Open and Frozen Appointments

Schedule Slots for Monday - 1ST Reconfiguration

Template ID: MON CAMPBELL
Clinic: FAMILY PRACTICE
Provider: CAMPBELL, ANN
Day: Monday

Start Time	Appt Type	Wkl Typ	#per Slot	Dur	Detail Codes	Slot Comment
0700	ACUT	C	1	30	BPAD 0-99	
0730	ACUT	C	1	30	BPAD 0-99	
0800	EST	N	1	30		
0830	EST	N	1	30		
0900	EST	N	1	30		
0930	EST$	C	1	30		
1000	WELL	C	1	30	FE BPAD	
1030	WELL	C	1	30	FE BPAD	

Press <RETURN> to continue

2. Automatic Reconfiguration of Open and Frozen Appointments

Schedule Slots for Monday – 2ND Reconfiguration

Template ID: MON CAMPBELL
Clinic: FAMILY PRACTICE
Provider: CAMPBELL, ANN
Day: Monday

Start Time	Appt Type	Wkl Typ	#per Slot	Dur	Detail Codes	Slot Comment
0700	ACUT	C	1	30	BPAD	0-99
0730	ACUT	C	1	30	BPAD	0-99
0800	ROUT	C	1	40	BPAD	17-65
0830	ROUT	C	1	40	BPAD	17-65
0900	ROUT	C	1	40	BPAD	17-65
0930	EST$	C	1	30		
1000	WELL	C	1	30	FE BPAD	
1030	WELL	C	1	30	FE BPAD	

Press <RETURN> to continue

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Set-up

- Each MTF has the option to turn reconfiguration on or off for its clinics. Automatic Appointment Reconfiguration is set to null initially.
- Each MTF will have its own reconfiguration task running.
- Each MTF defines the time CHCS will run its Reconfiguration task. The MTF may select any time to run the Reconfiguration task between 0000 and 0600 daily.
- If the Time to Run Reconfiguration is changed, the task will be immediately re-queued.

2. Automatic Reconfiguration of Open and Frozen Appointments

Reconfiguration Set-up (continued)

- Reconfiguration criteria may not be entered into CHCS Profiles, templates, or schedules until the Automatic Reconfiguration flag in the MTF's Profile is set to YES.
- Reconfiguration is automatically queued for Taskman.
- The name of the Reconfiguration task is <DMIS ID> SD AUTO RECONFIG SCHED.

2. Automatic Reconfiguration of Open and Frozen Appointments

PAS→Scheduling - > PROF Profiles -> DPRO Division Profile

MEDICAL CENTER DIVISION: WILFORD HALL DIVISION PROFILE

Name:	WILFORD HALL
Short ID:	
Building Name:	
Building Number:	
Street Address:	
City:	SAN ANTONIO
State:	TEXAS
ZIP:	97208
Schedule Deletion:	**120** day(s)
Patient Record Pull:	**1** day(s)
Radiology Record Pull:	**1** day(s)
Schedule Hold Duration:	**7** day(s)
DEERS Batch Pull:	**1** day(s)
Appt Overlap Interval:	**15** minutes
Inactivity Period:	**60** days

Print Encounter Data On Security Reports: **YES**

Automatic Appointment Reconfiguration: YES

Time to Run Reconfiguration: 0600

Tasks the job.
If NO, job won't run.

BREAK

Part II

3. Track Patient Appointment Requests

- **Requirement:** When a user searches for but does not book an appointment for a patient, CHCS upon exiting will prompt the user for a clinic and a coded reason and will store data about the patient's request.
  The data will be used for later reporting

- **Benefit**: Currently sites have no automated tool to track patient appointment requests where no appointment could be booked. In order to improve access, these calls need to be logged, tracked, reported, and followed up by the clinic.

3. Track Patient Appointment Requests

Upon exiting appointment booking without booking an appointment, the user will be prompted to enter 3 items of information in the following order. The two **required items** are in **bold**.

- ***Clinic*** - Defaults to the initial Clinic searched for the patient. The user may press return to accept the initial clinic or enter another clinic. If only one clinic is searched, the clinic will be display only. If no clinics were searched, the user must select a preferred clinic.

- ***Reason Appointment Not Booked*** – User must select a standard reason for the request. There is no default.
  Refer to the table of codes that follows.

3. Track Patient Appointment Requests

- *Reason Appointment Not Booked Free Text* – An optional field that may be used to document information such as preferred providers, an explanation for the Other code, follow-up instructions, etc. Clerks should be trained on what the clinic needs in this field or bypass the field.

3. Track Patient Appointment Requests

- Reason Appointment Not Booked - these are standard codes and are **not site definable.**
  - Added to waitlist
  - All appointments refused
  - Appointed to Network
  - No appointments available
  - No appointments available to contractor
  - Patient requested to call back
  - Request referred to MCSC
  - Request referred to MTF Clinic
  - Self-care recommended
  - Unsuccessful telephone transfer
  - Just Looking
  - Other

3. Track Patient Appointment Requests

- An ATC Category must be entered to trigger this function.
- CHCS will automatically capture the patient demographic and enrollment data, phone numbers, the ATC Category, and other appointment data required to report the patient's call.
- All data related to the patient request will be stored in a new file: *Non-Booked Appointments*.
- If a patient calls more than once, each call will be recorded.

4. Unbooked Appointment Request Report

- **Requirement**: Lists each patient request that did not result in a booked appointment.

- **Benefit**: This report may be used to follow-up each patient request in order to schedule the patient's appointment. Follow-up will ensure access for those who could not get an appointment. Sites will have new data to measure unmet demand.

4. Unbooked Appointment Request Report

- If a patient calls more than one time, their call will be reported each time.
- Enables sites to evaluate the need for repeated contact to obtain an appointment.
- Pulls report data from the file: Non-Booked Appointments

4. Unbooked Appointment Request Report

PAS System Menu→Scheduling Supervisor Menu → MGRM Management Reports Menu → PMGR Problem Avoidance Reports Menu→ 7 Unbooked Appointment Request Report

- User may select the following:
  - One, multiple, or all Divisions
  - One, multiple, or all Clinics*
  - ATC Categories
  - Reasons Appointment Not Booked
  - Date/Time Range

- Requests are listed in order by date/time of call.
  *within the selected Divisions and Clinics.

4. Unbooked Appointment Request Report

WILFORD HALL 21 Jul 2003@2115 Page 1

Personal Data - Privacy Act of 1974 (PL 93-579)
*** UNBOOKED APPOINTMENT REQUEST REPORT ***
From: Jun 2003 To: Jun 2003
Division/DMIS: WILFORD HALL DIVISION - 0009
Clinic/MEPRS: FAMILY PRACTICE BGAA

Access to Care Category
Reason Appt Not Booked
Request Date/Time Patient FMP/SSN PATCAT PCM Division/MTF
HCDP Clerk Referral #
Reason Appt Not Booked (Free text) Work Phone Home Phone

ACUTE

NO APPOINTMENTS AVAILABLE

01JUN2003@0809 ANDERSON,KIMBERLY C 20/555127890 A11 CAMPBELL,ANN 0009/WILFORD HALL
108 - TRICARE PRIME FAMILY COVERAGE FOR ACTIVE DUTY FAMILY MBR SMITH,CLERK 2002000143
NO APPOINTMENT AVAIL FOR PATIENT REQUEST DATE (888)222-3333 (888)222-3331

4. Unbooked Appointment Request Report

WILFORD HALL 21 Jul 2003@2115 Page 1

Personal Data - Privacy Act of 1974 (PL 93-579)
*** UNBOOKED APPOINTMENT REQUEST REPORT ***
From: Jun 2003 To: Jun 2003

Division/DMIS: WILFORD HALL DIVISION 0009
Clinic/MEPRS: FAMILY PRACTICE BGAA

==========

Access to Care Category
Reason Appt Not Booked
Request Date/Time Patient FMP/SSN PATCAT PCM Division/MTF
HCDP Clerk Referral #
Reason Appt Not Booked (Free text) Work Phone Home Phone

==========

ACUTE

SELF-CARE RECOMMENDED

05JUN2003@0830 HANSCOM,KIMBERLY C 20/555125678 A11 CAMPBELL,ANN 0009/WILFORD HALL
108 - TRICARE PRIME FAMILY COVERAGE FOR ACTIVE DUTY FAMILY MBR SMITH, CLERK 002000240
DOES NOT NEED TO SEE THE DOCTOR (888)222-3333 (888)222-3333

5. Appointment Change Tracking Report

- **Requirement**: This report compares planned appointments to actual booked appointments to identify change patterns required to the schedule to better match patient demand for appointments. Appointment must be booked to appear on this report.

- **Benefit**: Use as a planning tool to help analyze and tailor Provider Schedules to better meet actual patient demand, e.g., more Routine appointments, more Active Duty slots, etc.

5. Appointment Change Tracking Report

- Only displays appointments that have been booked.
- Compares only appointment types and detail codes.
- Only displays appointments whose appointment type and/or detail codes have changed.
- Duration cannot be matched since a change in duration is always changed in the Schedulable Entity file.

5. Appointment Change Tracking Report

- *PAS System Menu→Scheduling Supervisor Menu → MGRM Management Reports Menu → PMGR Problem Avoidance Reports Menu→ 8 Planned vs Final Booked Appointment Data*

- Report Selection Criteria

  - One, multiple, or all Divisions
  - One, multiple, or all Clinics *
  - One, multiple, or all Providers*
  - Date Range
  - Detail or Summary Report

  *within the selected Divisions and Clinics.

5. Appointment Change Tracking Report

WILFORD HALL 26 Jul 2003@0830 Page 1

Personal Data - Privacy Act of 1974 (PL 93-579)

***** PLANNED VS. FINAL BOOKED APPT DATA DETAILED *****

From: 01 Jun 2003 To: 16 Jun 2003

Division/DMIS: WILFORD HALL DIVISION - 0009

Clinic/MEPRS: FAMILY PRACTICE - BGAA

Provider/ Appt Date/Time Booking Agent	ATC Category Selected Planned Schedule Data	Final Booked Appt Data
WOLLIN, MOLLY	ACUTE	
03Jun2003@0800	Appt Type PCM	Appt Type ROUT
TRICAREONLINE	Detail Code CHOL	Detail Code BPNAD
LEE, JUDY	ROUTINE	
04Jun2003@0900	Appt Type ROUT	Appt Type ACUT
Fitzmaurice,Gail	Detail Code CHOL	Detail Code BPAD

5. Appointment Change Tracking Report

WILFORD HALL 26 Jul 2003@1548 Page 1

Personal Data - Privacy Act of 1974 (PL 93-579)

*** **PLANNED VS FINAL BOOKED APPT DATA SUMMARY** ***

From: 01 Jun 2003 To: 30 Jun 2003

Division/DMIS: WILFORD HALL DIVISION - 0009

Clinic/MEPRS: ALLERGY CLINIC - BABA

Provider	Appt Type Planned	Final	Detail Code Planned	Detail Code Final	Total Appts	Cngd
BARRON,JANE	WELL	ACUT	ANGER ANPST MOBEX		1	
CAMPBELL,ANN	SPEC$	ROUT	ADSC		1	
SIMONS,MARY	ACUT$	ACUT	17-99		1	
	ROUT	ROUT	ANGER 17-99	17-99	2	

ALLERGY CLINIC – BABA: 5

6. Split and Join Appointments

- **Requirement**: When selecting an appointment to book, provide easy access to the split or join functionality.

- **Benefit**: This function will allow sites to easily tailor appointment lengths so that the provider's time is used efficiently to care for the maximum number of patients.

6. Split and Join Appointments

- Common Functions
  - The user will not be able to select appointments to split or join if they do not have the security keys (APPT CHANGE AUTHORITY) to modify the appointment type for the provider's appointment, i.e., if the appointment is preceded by a hyphen.

6. Split and Join Appointments

- Splitting Appointments
  - In all booking functions, if a user selects only one appointment, the new (S)plit option will now display in addition to the (B)ook and (M)odify options.
  - The user will be asked the number of slots to split the appointment into.
  - CHCS will display the number of the slot being created.

6. Split and Join Appointments

- Splitting Appointments (continued)
  - The attributes of each new appointment will default to the attributes of the original slot.
  - The user will be able to enter/edit the data for the new appointment as per current functionality.
  - CHCS will calculate the duration of each new slot. The duration will be the original appointment duration minus the sum of the durations of the new split appointments defined to this point.

6. Split and Join Appointments

- Splitting Appointments (continued)
  - The user may edit the duration on each new slot. The duration may be greater or less than the original duration.
  - CHCS will warn the user when the collective duration on the new appointments is greater than the original duration and will display the current sum.

6. Split and Join Appointments

- Joining Appointments
  - The (J)oin option will display if the user selects two or more contiguous appointments that have the same provider and place of care. The (B)ook and (M)odify options will also display.
  - CHCS will join the appointments into one appointment.
  - The attributes of the new appointment will default to the attributes of the first slot selected on the list.
  - The user will be able to enter/edit the data for the new appointment as per current functionality.

6. Split and Join Appointments

- Joining Appointments (continued)
  - CHCS will calculate the default duration as the sum of the durations of the selected appointments.
  - The user may edit the duration and other data.
  - Duration may be greater than the sum of the original durations as per current functionality.
  - CHCS will warn the user when the duration is greater than the original duration.

6. Split and Join Appointments (Split Appointments)

FILE APPOINTMENT

Patient: SIMMONS,JEFF J FMP/SSN: 20/555-12-3456
Place of Care: FAMILY PRACTICE PLOC Phone: 210 234-0932
Detail Codes: ATC Category: ROUTINE
Provider: CAMPBELL,ANN A ppt Type:
Location:
Spec Type:
Clinic Spec: Provider Spec:
Date Range: 16 Jun 2003 to 22 Jun 2003 Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400 Duration:

---

* ~TUE 0800 17Jun03 ACUT$ 1/0 30 FE 30-60 ANGER
~TUE 0830 17Jun03 ACUT$ 1/0 30 FE 30-60 ANGER

---------- Select Slot #1 of 1 ----------

Use SELECT key to select appt to be booked or press Enter to view all appts
Or **Select one slot to split, multiple consecutive slots to join**
'-' indicates security key(s) are required to select these slots
Press F9 to view additional appointment data

6. Split and Join Appointments (Split Appointments)

FILE APPOINTMENT

Patient: SIMMONS,JEFF J FMP/SSN: 20/555-12-3456
Place of Care: FAMILY PRACTICE PLOC Phone: 210 234-0932
Detail Codes: ATC Category: ROUTINE
Provider: CAMPBELL,ANN A ppt Type:
Location:
Spec Type:
Clinic Spec: Provider Spec:
Date Range: 16 Jun 2003 to 22 Jun 2003 Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400 Duration:

---

* ~TUE 0800 17Jun03 ACUT$ 1/0 30 FE 30-60 ANGER
~TUE 0830 17Jun03 ACUT$ 1/0 30 FE 30-60 ANGER

---------- Select Slot #1 of 1 ----------

Select (B)ook appt, (M)odify appt, **(S)plit slot** or (Q)uit FILE APPOINTMENT: B// S

The number of slots to split to? 2

6. Split and Join Appointments (Editing the New Appointment)

APPOINTMENT SLOTS: 3 INPATIENT BROWSE CHANGE

MON 0800 17Jun03 ACUT$ 1/0 30 FE 30-60 ANGER 30 MIN OPEN
Clinic: FAMILY PRACTICE
Provider: CAMPBELL,ANN
Division: NAVY INPATIENT DIVISION
Booked appointments:
Maximum overbooks allowed:
Day of Week: MON
Appointment Slot Status: OPEN

==========

Appointment Type: **ROUT**
Duration: **15**
Workload Type: **COUNT**
Detail Codes:
17-65
FE
Number of patients: **1**
Appointment SLOT Comment:

6. Split and Join Appointments (Join Appointments)

FILE APPOINTMENT

Patient: SIMMONS,JEFF J — FMP/SSN: 20/555-12-3456
Place of Care: FAMILY PRACTICE WH — PLOC Phone: 210-666-9870
Detail Codes: — ATC Category: ROUTINE
Provider: CAMPBELL,ANN — Appt Type:
Location:
Spec Type:
Clinic Spec: — Provider Spec:
Date Range: 16 Jun 2003 to 22 Jun 2003 — Days of Week: M TU W TH F SA SU
Time Range: 0001 to 2400 — Duration:

```
* ~TUE 0800 17Jun03    ACUT$   1/0   10   FE   30-60   ANGER
* ~TUE 0810 17Jun03    ACUT    1/0   10   FE   30-60   ANGER
* ~TUE 0820 17Jun03    ACUT$   1/0   10   FE   30-60   ANGER
  ~TUE  0830 17Jun03   ACUT$    1/0   30   FE  30-60 ANGER
 ---------------------------- Select Slot #1 of 3 ----------------------------------
```

Select (B)ook appt, (M)odify appt, **(J)oin slots,** (S)kip appt, (V)iew, or (Q)uit FILE APPOINTMENT: **J**

6. Split and Join Appointments (Editing the New Appointment)

APPOINTMENT SLOTS: 3 SINGLE PATIENT BROWSE CHANGE

TUE 0800 17Jun03 ACUT$ 1/0 10 FE 30-60 ANGER 10 MIN OPEN
Clinic: FAMILY PRACTICE
Provider: CAMPBELL,ANN
Division: NAVY INPATIENT DIVISION
Booked appointments:
Maximum overbooks allowed:
Day of Week: TUE
Appointment Slot Status: OPEN

==========

Appointment Type: **ROUT**
Duration: **30**
Workload Type: **COUNT**
Detail Codes:
17-65
MA

Number of patients: **1**
Appointment SLOT Comment:

7. Enrolled Elsewhere

- **Requirement**: Allow users to book appointments at the selected MTF for TRICARE enrolled beneficiaries who are traveling and/or on temporary duty away from their enrolling MTF and PCM and for all non-enrolled active duty. In addition store the name of the current PCM on the appointment record.

- **Benefit**: Eliminates the user training issues and patient confusion involved with the use of Non-Enrollee Booking for a Prime or Active Duty patient.

7. Enrolled Elsewhere

- Both TRICARE enrollees booking appointments on other than their own CHCS host and all non-enrolled Active Duty will be booked under Enrolled Elsewhere.
- Appointments will be booked with functionality similar to Non-Enrollee booking, i.e., to any PCM or provider, at any place of care, at any MTF, on any CHCS host where the patient is not enrolled.
- Non-enrollee booking will be available only to non-enrollees and will no longer be available to Active Duty.

7. Enrolled Elsewhere

Booking Functions Available

- If fully enrolled to an MTF on the CHCS host:
  PCM Booking
  Self-Referral
  Consult/Referral

- If enrolled to an MTF on the CHCS host without an assigned PCM:
  Enrollee Booking
  Self-Referral
  Consult/Referral

7. Enrolled Elsewhere

Booking Functions Available (continued)

- If enrolled to an MTF not on the CHCS host or enrolled to a civilian PCM:
  Enrolled Elsewhere
  Self-Referral
  Consult/Referral

- If Active Duty/temporary duty not enrolled:
  Enrolled Elsewhere
  Self-Referral
  Consult/Referral

7. Enrolled Elsewhere

Booking Functions Available (continued)

4. If a non-enrollee who is not Active Duty:
   Non-Enrollee Booking
   Self-Referral Booking
   Consult/Referral

5. If TRICARE Plus enrolled to an MTF that is not on the CHCS host:
   Non-Enrollee Booking
   Consult/Referral

7. Enrolled Elsewhere

- Patients will require a consult/referral to obtain primary and specialty care at any MTF that (1) is not their enrolling MTF and (2) that resides on the same CHCS host.
- TRICARE Plus are Prime at the enrolling MTF for Primary Care only, not for specialty care. (Refer to 5, last slide)
- If available, CHCS shall store in the Patient Appointment file the name of each enrollee's PCM effective at the time of the appointment.

7. Enrolled Elsewhere

New Health Care Delivery Program Codes (HCDP) for Enrollees

001 Direct Care for Active Duty Sponsors
106 TRICARE Prime Individual Coverage for Active Duty Sponsors
107 TRICARE Prime Individual Coverage for Active Duty Family Members
108 TRICARE Prime Family Coverage for Active Duty Family Members
110 TRICARE Prime for Individual Coverage for Survivors of Active Duty Deceased Sponsors
111 TRICARE Prime Family Coverage for Survivors of Active Duty Deceased Sponsors
112 TRICARE Prime Individual Coverage for Transitional Assistance Sponsors and Family Members
113 TRICARE Prime Family Coverage for Transitional Assistance Sponsors and Family Members
116 TRICARE Prime Individual Coverage for Retired and Medal of Honor Sponsors and Family Members
117 TRICARE Prime Family Coverage for Retired and Medal of Honor Sponsors nd Family Members

7. Enrolled Elsewhere

New Health Care Delivery Program Codes (HCDP) for Enrollees

128 TRICARE Remote Individual Coverage for Active Duty Sponsors
129 TRICARE Remote Individual Coverage for Active Duty Family Member
130 TRICARE Remote Family Coverage for Active Duty Family Members
131 TRICARE Prime Individual Coverage for Transitional Survivors of Active Duty Deceased Sponsor
132 TRICARE Prime Family Coverage for Transitional Survivors of Active Duty Deceased Sponsors
134 TRICARE Prime Individual Coverage for Transitional Survivors of Guard/Reserve Deceased Sponsors
135 TRICARE Prime Family Coverage for Transitional Survivors of Guard/Reserve Decease Sponsors
136 TRICARE Prime Individual Coverage for Survivors of Guard/Reserve Deceased Sponsors
137 TRICARE Prime Family Coverage for Survivors of Guard/Reserve Deceased Sponsors

7. Enrolled Elsewhere

HEALTHCARE FINDER BOOKING

Patient: **CRAWFORD,DUCHESS** FMP/SSN: **20/777-27-7242**
Pat SSN: **777-27-7242** Sex/DOB/Age: **F/01 Jul 1973/30Y**
PatCat: **USN ACTIVE DUTY** Reg Code:
PCM: PCM Phone#:
PCM Loc Type: PCM Start Date:
HCDP St/End: MED:
Last Elig Ck: DMIS: USS CORONADO (AGF11)
HCDP: **TRICARE Prime Active Duty**

==========

Sponsor: **CRAWFORD,DUCHESS** Spon Rank: **LIEUTENANT**
Spon PatCat: **USN ACTIVE DUTY** Duty Phone: **210 333-3333**
Sponsor UIC: **USN FLIGHT SCHOOL** DSN: ...
Reg Comment:
O/P Rec Room: Reg Updated: **06 Nov 2002@110247**

==========

Select (A)OP, E**nrolled Else(w)here,** (R)eferral Booking, (S)elf-Referral Booking, (V)iew/Query DEERS, (F)uture/Past Appts, (L)og Non-MTF Appt, (D)emographics, (O)utput Products, or (Q)uit: W//

7. Enrolled Elsewhere

HEALTHCARE FINDER BOOKING

Patient: **CRAWFORD,DAN** FMP/SSN: **02/777-27-7242**
Pat SSN: **777-27-7242** Sex/DOB/Age: **M/01 Jul 2000/03Y**
PatCat: **USN Active Duty Family Member** Reg Code:
PCM: PCM Phone#:
PCM Loc Type: PCM Start Date:
HCDP St/End: MED:
Last Elig Ck: DMIS:
HCDP: **TRICARE Standard for Active Duty Family Members**

==========

Sponsor: **CRAWFORD,DUCHESS** Spon Rank: **LIEUTENANT**
Spon PatCat: **USN ACTIVE DUTY** Duty Phone: **210 333-3333**
Sponsor UIC: **USN FLIGHT SCHOOL** DSN: ...
Reg Comment:
O/P Rec Room: Reg Updated: **06 Nov 2002@110247**

==========

Select **(N)on-enrollee Booking**, (R)eferral Booking, (S)elf-Referral Booking,
(V)iew/Query DEERS, (F)uture/Past Appts, (L)og Non-MTF Appt,
(D)emographics, (O)utput Products, or (Q)uit: N//

Table Updates

TABLE UPDATES

DENTAL AND MEDICAL CODES

Table Updates

- Dental clinics will now use CHCS MCP to book appointments. New standard codes will be required for appointing. The new codes are:

Data Element	Code	Description	Standard
Appointment Type	DROUT	Dental Routine	21 days May only be used by Dental.
Access to Care Category	DROUTINE	Dental Routine	21 days May only be used by Dental.
Detail Codes	15 new codes	See chart.	

- Dental recommends use of the following medical/dental appointment types: ACUT, DROUT, WELL, SPEC, and PROC.
- Medical and Dental may use each other's detail codes.

Table Updates

- **15 New Dental Detail Codes**

  - DCONS Dental Consultation
  - DENDO Endodontics
  - DEVAL Dental Evaluation
  - DEXAM Dental Examination
  - DEXPRDental Exam/Prophylactic Cleaning
  - DOMFS Oral Maxillofacial Surgery
  - DOPER Operative Dentistry
  - DORTHO Orthodontics
  - DPEDO Pediatric Dentistry
  - DPERIO Periodontics
  - DPO Dental Post-Operative Visit
  - DPRO Dental Prophylactic Cleaning
  - DPROS Prosthodontics
  - DSC Dental Sick Call
  - DTMD Temporomandibular Disorders

Table Updates

- 23 New Medical Detail Codes

• ACUP	Accupuncture
• BF	Breast Feeding
• CM	Case Management
• ER	Emergency Room Follow-up
• **GDBL**	**Good Backlog Appointment**
• INF	Infant Care
• LEEP	Loop Electro-Surgical Excision Procedure
• MOVDIS	Movement Disorder
• ORTHO	Orthopedics
• PRENAT	Prenatal
• **RP1-RP10**	**Research Protocol *(10 separate detail codes)***
• STROKE	Stroke
• TOUR	Hospital Orientation
• VAERS	Vaccine Adverse Event Reporting

Table Updates

- **Revised Medical Detail Codes**
  - BPAPS — Active Duty, Prime, TRICARE Plus, and Special Programs Patients
  - BPSP — Special Programs Patient, and TRICARE Plus
  - BPPR — TRICARE Plus removed
- **Inactivated Appointment Types**
  - TCON, TCON$, and TCONX will be inactivated. They are no longer standard appointment types. Functionality is replaced by Track Patient Appointment Request SCR # 3.

Access to Care Summary Report

- The CHCS ATC Summary Report will be updated to measure access in the same manner as the similar report on the TRICARE Operations Center web page.
- Now includes patient cancellations, no-show, and leave without being seen in met, not met, and refusal counts.
- For these three types of appointment, Met and Not Met counts will be derived from the appointment data at the time the appointment was booked.
- Answers the question: Did the patient have access?
- Mapped to the new Health Care Plan Delivery Codes
- Sorts by Division, by Clinic, then by ATC Category, then by Beneficiary Category, then by Provider

Access to Care Summary Report

FACILITY CANCELLATION ISSUE

Menu: CA>PAS>S>NOT>CNOT

- **Beware**: Use CMSC to cancel by facility and answer 'YES' to the prompt, "Process the patients?
- User is then moved automatically to the Cancellation Notice (CNOT) function or may go there immediately through the PAS Supervisor Menu above or the PAS Managed Care Menu.
- Use CNOT to **immediately** reschedule the appointment. Otherwise the clinic gets an automatic 'Not Met' for the appointment.

Access to Care Summary Report

PATIENT CANCELLATION

- If a *patient cancels* an appointment and does not reschedule, the appointment is still met or not met based on the original appointment data at the time the appointment was booked.

- If a *patient cancels* and reschedules, CHCS uses the date the patient reschedules as the start date to measure access.

Site Preparation - Dental

- Dental clinics will begin using MCP Booking and Appointment Standardization. May convert templates and schedules in advance to the recommended medical standard appointment types and the new Dental standard appointment type (DROUT).
- Dental recommends use of the following medical/dental appointment types for dental appointments: ACUT, DROUT, WELL, SPEC, and PROC.
- CHCS Dental will not be able to create templates and schedules containing non-standard appointment types after APS III is installed. However dental appointments with non-standard appointment types will be able to be booked.
- May need to use Self-Referral Booking to book Dental appointments.

Site Preparation – Medical and Dental

- Decide whether to reconfigure at the clinic, provider, and/or appointment level
- Determine which provider schedules or individual appointments are candidates for reconfiguration.
- Determine which individual appointments need to be reconfigured or unfrozen, e.g., appointments saved for Emergency Room patients
- Set up time to reconfigure appointments and turn on CHCS Reconfiguration feature.

Site Preparation – Medical and Dental

BOOKING STAFF

- Train users on low-lite and high-lite appointments
- Train users on the new search period of 28 days
- Train the Enrolled Elsewhere booking function
- Train the new Join and Split functionality

Site Preparation – Medical and Dental

MANAGEMENT TRAINING

- Train the Patient Request without a Booked Appointment feature and the accompanying report.
- Train the Appointment Change Tracking Report
- Train the new Access to Care Summary Report

Site Preparation - Security

- Assign the SD APPT STAND security key to:
  - users who will enter/correct appointment detail codes during booking
  - scheduling supervisors who will enter detail codes in the Clinic and Provider Profiles and in Templates and Schedules.

- Assign SD CHG AGE GNDR to those users who will be permitted to change age and/or gender codes when booking an appointment.

Site Preparation - Security

- Create APPT CHANGE AUTHORITY security keys on appointment types in the Clinic and Provider Profiles. These may be site defined.

- Assign APPT CHANGE AUTHORITY security keys to users who will be permitted to correct appointment types when booking that appointment type for that clinic or provider. They may be required to perform the correction in order to book the appointment.

APS III Release

- The APS III release will be distributed on CD to the sites as it is too large to download.
- Each site may schedule its own downtime to load the software.
- APS III has been postponed pending deployment of the HIPAA release and is not expected to be available before January 2004.

APS III Training

- This APS III presentation with a voice over will be available on two web sites and may be downloaded:
  - an Air Force Access to Care web site (to be announced)
  - the TRICARE Access Imperatives web site at http://tricare.osd.mil/tai.
- Once the APS III deployment schedule is published, additional APS III training teleconferences covering this presentation will be considered based on requests from sites.

MCP CBT Training

- An MCP APS II Advanced Computer Based Training (CBT) course was prepared by the government.
- This CBT will be migrated to WBT (Web Based Training) and will include APS III functionality sometime after APS III deployment.
- The APS II CBT is on the web page at: https://chcswebsrvr.spawar.navy.mil/. A user id and password must be requested in order to access this site. The CBT is located in the Software section under CBT Downloads.
- This CBT currently demonstrates how to book appointments in the MCP APS II Healthcare Finder module and to build schedules and templates in APS II.

Where to go for information

- TRICARE Access Imperatives Web Site
  - http://tricare.osd.mil/tai
  - *Commander's Guide for Access Success - August 15, 2003*
    - » Suggested implementation steps
    - » Operational definitions of APS codes
  - Under Software Enhancements, reference:
    - » APS I PR&DD Document
    - » APS II PR&DD Document
    - » APS II Addendum
    - » APS III PR&DD (soon available)

APS PHASE III

QUESTIONS ???